STUDENT AID FOR DISTANCE LEARNERS

CHARTING A NEW COURSE

Summary and Proceedings of

The Roundtable on Student Aid for Distance Learners

Denver, Colorado

May 2-4, 1998

Prepared by:
THE INSTITUTE for Higher Education Policy
Washington, DC
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Sponsors:
American Express Educational Financing
Colorado Community College & Occupational Education System
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PREFACE

In May of 1998, the steering committee for the Colorado Roundtable invited financial aid professionals and educators from around the United States to participate in a discussion on the future of student aid and distance education at a conference entitled “The Roundtable on Student Aid for Distance Learners.” Eighty-six participants from 36 states and the District of Columbia gathered for the two-day meeting in Denver. This meeting was the culmination of ongoing discussions in Colorado about the difficulties institutions face as they develop new methods for delivering instruction within the constraints of current laws and regulations governing Title IV financial aid. The intent of the Roundtable was to move beyond identifying the problems and barriers in the existing statutes in order to envision a future where students use their federal financial aid for educational delivery anytime, anywhere. The excellent turnout and willingness of participants to share ideas and information suggests that modernizing the delivery of student financial aid is a top priority for many institutions of higher education across the country.

BACKGROUND

Colleges and universities are rapidly adopting new technologies for instructional delivery. In 1997 Education Secretary Riley proposed several changes to the Higher Education Act (HEA) related to distance education. He reported that “valuable technologies are important for providing opportunities in higher education at a time when college is becoming ever more crucial...making courses available at convenient locations; reducing time constraints for course-taking; making educational opportunities more affordable; and increasing the institutions’ access to new audiences.” Riley commented on the recent study by the National Center for Education Statistics which showed that one-third of institutions in the country were offering distance education courses in the fall of 1995 and that at least another quarter were planning to offer courses using distance methods over the next three years. He lamented that these institutions served fewer than one million students in 1995. “While colleges and universities have been exploring the uses of technology,” he said, “its capacity for increasing access to higher education has been limited because of restrictions on financial aid availability for distance learners.”

Financial aid professionals are aware that providing timely and adequate financial aid to students is one of the keys to increasing access to higher education. Yet some provisions of the Higher Education Act and the Title IV regulations are seen as barriers to aiding distance education students. In efforts to assure institutional accountability for Title IV funds, colleges and universities perceive that they are discouraged from experimentation by an ever-increasing web of federal regulatory requirements.

With this environment in mind, the Colorado Roundtable designed the national meeting with two purposes. The first was to enable financial aid professionals to come together in a comfortable setting to share ideas about meeting the current challenges of providing financial aid to distance education students at their own institutions. The second was to create an action agenda for the future by identifying key principles that decisionmakers in institutions of higher education and the state and federal policy arena could use as guidelines when formulating policy for distance education. Meeting participants represented all sectors of higher education, the U.S. Department of Education, and Project EASI, thus assuring the widest possible variety of experience and ideas. In order to formalize these outcomes and disseminate them in an accessible format, the Colorado Roundtable asked Jamie Merisotis, President of The Institute for Higher Education Policy, to facilitate the meeting and draft these proceedings.

THE AGENDA

The two-day agenda outlined the daunting task of both completing the small group discussions and reaching some unified vision in the final sessions. Participants self-selected into four interest groups based on their type of institution. To facilitate the discussion, participants were urged to consult a specially-designed conference web page prior to arriving at the meeting. The web page contained the conference agenda and a description of the four interest groups. In addition, contributors to the web page provided a variety of background information, including a paper containing an extensive review of federal Title IV statutes and regulations affecting distance education, excellent links to other distance education sites, and articles contributed by NASFAA and the U.S. Department of Education.

ACKNOWLEDGMENTS

No venture of this size can be undertaken without the hard work, dedication, and financial support of many individuals and organizations. Especially important were the members of the Colorado Roundtable steering committee co-chaired by Jerry Sullivan, University of Colorado, Boulder and Carol Linsley, Colorado Community College and Occupational Education System. Members of the committee were: Lydia MacMillan, Conference Treasurer, Regis University; Rick Lee, Arapahoe Community College; Mary Bopp, Front Range Community College; Carol Garnett, Community College of Denver; Ellie Miller, University of Colorado, Denver; Roger Koester, Colorado School of Mines; and John Ceru, Colorado Commission on Higher Education. Robert Collins from the University of Colorado, Boulder created and maintained the conference web page and was responsible for the local arrangements. Both
THE ROUNDTABLE DISCUSSION AND SCENARIOS

The Roundtable on Student Aid For Distance Learners was organized around a set of four group discussions. During the two days of meetings, attendees participated in one of the small groups. To stimulate discussion, each group was provided a scenario describing a different type of institution. The college models are fictitious, with the exception of the Consortium Model, which is based on the California Virtual University. However, each of the other three models are based on the real experiences of institutions in that category. The four scenarios contained information about the governing structure, types of instructional offerings, student services, and the mode of delivery (see Appendix for the complete text of each scenario). The discussion groups grappled with the problems unique to a particular type of institution as well as the universal problems presented by trying to gain institutional eligibility, assure accountability, and aid students attending through different modes of delivery.

The four scenarios included:

- a Traditional University Model, which focused on meeting the needs of distance and non-traditional students while staying within the regulatory requirements of the traditional four-year, semester format;
- a Consortium Model, which featured a variety of types of colleges cooperating to create an online catalog and transparent transfer of online offerings;
- a Combination Model, which grappled with the complexity of meeting students’ needs both in semester and open-entry, open-exit format, as well as in a college that offers 100 percent of its instruction through distance delivery; and
- a Non-Traditional Institution Model, which dealt with problems like measuring achievement through competencies rather than clock hours or granting degrees but offering no classes.

Groups met in morning and afternoon sessions to envision a future with no barriers to aiding distance students. They proposed ideas for bridging the gap between current reality and future solutions. The results of the discussion were collected into a preliminary written report of findings. Each attendee received a copy of this report, which included the group’s findings broken down into three categories:

- Where Are We Now? This includes a summary of the significant barriers facing the institutions in that model with respect to student aid for distance learning;
Where Would We Like to Go? This includes the “vision” that group participants have developed for that model, and the strategies for achieving this new vision, and;

What Do We Need to Change? This includes the specific steps and procedures that need to be taken to achieve success in these models, including changes to law and regulations.

Edited versions of these preliminary written reports are contained in this publication.

To provide background for the small group work, several general sessions addressed the challenges of using distance technology to change education. Kay Howe, a prominent educational consultant and expert on distance learning, opened the conference with a videotaped address. She raised the specter of threats to the hegemony of traditional public and non-profit education systems from both the propriety sector and the corporate sector. Mary Beth Susman, President of the Colorado Electronic Community College, hosted the opening reception at the world-class Education Technology and Training Center, which is part of the commitment made by the Colorado Community Colleges to distance education. At the lunch session on the second day she presented a demonstration of a current initiative, which allows the simultaneous delivery of an Associate’s Degree in business by the 12 community colleges over the Internet. At that same session Barbara Krauth, Project Director for the Western Interstate Commission on Higher Education, reviewed the findings from her survey of colleges entitled “Putting Principles into Practice: Developing Effective Student Services for Distance Learners.”

Five representatives from the U.S. Department of Education, headed by Marianne Phelps, Chief of Staff of the Office of Postsecondary Education, presented a breakfast panel addressing distance education. The panelists were J. Scott DeFeo, Executive Director of the American Distance Education Council; David Raju, Director of Distance Education Programs at the University of Pennsylvania; George Kuh, Professor of Higher Education at the Pennsylvania State University; and Karen Small, Director of the Institute for Higher Education Policy. The panelists each provided different perspectives on the future of distance education and the challenges facing institutions and students. The panelists agreed that distance education is a growing field and that there is a need for more research and development in this area.

On the final morning the entire group of Roundtable participants gathered to merge their findings and perspectives. Jamie Merisotis, President of The Institute for Higher Education Policy, facilitated a lively discussion intended to derive common themes and important principles from the wide-ranging discussions of the small groups. This discussion provides the basis for the Principles for Future Policy Development and Dialogue found later in this publication.

GROUP 1

SCENARIO: TRADITIONAL UNIVERSITY

The “Traditional University” model focuses on four-year institutions providing certificate programs through master level degrees. Students’ enrollment status is defined by semester. Multiple modes of educational delivery are utilized including traditional classroom, accelerated classroom, independent study, credit for prior learning, and distance learning. Consortium agreements with two-year institutions are important to these traditional institutions.

WHERE ARE WE NOW?

The status of students’ current accessibility to student assistance, and the potential barriers that might be faced in a distance learning context, can be broken down into several areas:

Cost/Price: State reimbursement of costs is different for distance education. School charges to students are based upon different levels of state support (tuition) and fees (services used). Some students mix on-campus and distance learning.

The cost of financial aid office processes is also higher under this scenario. Resources are not always made available/dedicated to these purposes, and computer systems and technical staff are not available to handle distance programs.

Calendar: Most institutions under this scenario are currently forcing all students into traditional terms. The problem for distance learning is that academic programs are trying to provide flexibility, but regulatory restrictions don’t allow much leeway.

Several academic calendar definitions under federal law are not conducive to allowing for distance education. These include:

- Program length requirements;
- Academic year definition—30-week academic year is not appropriate for distance learning;
Definition of a week—does not apply when there is no classroom seat time; and

Last date of attendance rules for refunds and loan repayment.

Disbursements: Timing of student aid disbursements is complicated by the fact that there may be many different start dates. Most institutions currently enroll and disburse based upon a standard semester.

Financial aid counseling: How to deliver good counseling and entrance/exit interviews is a significant problem when students may never or only infrequently be on campus. Current regulations require that students be on campus for their loan counseling exit interview.

Site definitions/approvals: There is currently a backlog of approvals by the U.S. Department of Education in the approval of new sites. This is a major hurdle for institutions seeking to expand distance-based learning.

Institutional evaluation: One limitation of current law is that all schools are evaluated on their stewardship of federal resources, using the exact same criteria. While common standards of performance are important, different types of schools should be evaluated according to their mission, method of instructional delivery, and other criteria.

Satisfactory academic progress: In the distance learning setting, there are different end dates for classes depending on when the student began the program of study. And since seat time is not an essential measure of progress in distance learning, regulations that measure progress based on seat time are limiting. Another complication with current regulations is that institutions that work on consortial arrangements may have significantly different grading systems. Determining whether a student is making satisfactory progress therefore is difficult under these arrangements.

Where Would We Like to Go?

Several suggestions were proposed to address the limitations cited above. In the area of determining costs, flexibility within guidelines is essential. Institutions should be able to determine the budget, within certain parameters. Computers should not be excluded in determining the student budget—a computer is as essential in the distance learning context as a tool kit is in a vocational training program, or even dental hygiene tools in a dental school.

With respect to indirect costs, there are no easy solutions. It may be possible to estimate indirect costs based on the number of credits taken, although we acknowledge that even this approach would present problems, since students can make changes in the number of credits taken after aid has been awarded. In any case, indirect costs should be calculated on a semester basis. Subsidized aid is best used to pay for direct costs, with unsubsidized aid (loans) best used to pay for indirect costs.

The last date of attendance also is an anachronism in the distance learning context, and needs to be eliminated, with standards of academic progress replacing this time measure. Similarly, regulations need to be changed to eliminate the 12 hour rule for the definition of an academic week.

What Do We Need to Change?

In addition to the changes proposed above, we think it is important not to penalize students for accelerating their studies. Distance learning allows individuals to learn at a pace more consistent with individual learning styles and schedules; laws and regulations should not inhibit that flexibility for learners.
GROUP 2

SCENARIO: CONSORTIUM MODEL

This discussion does not include a paradigm shift in how we view financial aid in distance learning environments. Instead, it tries to accommodate traditional processes in financial aid. Basic to the consortium model is the concept of home/host school arrangement. Each student is enrolled at one home school campus. The home school retains control over degree and program requirements including credentials and awarding of degrees. This model is academically-centered rather than student-centered in that the academic approval process is required up-front prior to the completion of a consortium agreement.

WHERE ARE WE NOW?

Proper use of the consortium agreement ensures prior academic review of courses, programs, and academic counseling by the home institution. This may be for individual students or articulation for whole classes of students in certain academic programs. The consortium model assumes significant involvement of faculty.

Many of the impediments to using financial aid for distance learning students in the consortium environment can be overcome by modifying internal institutional practices and relying on the home institution for final judgment.

In reviewing the federal financial aid issues that are typically associated with distance learning, it was decided that the problem areas are not unique to distance learners and should be addressed for all learners. For example:

Ability to benefit: This is not an issue in the distance learning consortium model because the home institution makes the academic judgment that the student has the ability to benefit, as they do currently for traditional students.

Price of attendance: The process currently used to determine additional costs through professional judgment is the same process that would determine additional costs associated with students in the distance learning environment. There is concern that the three types of budgets—commuter, on-campus, and off-campus—may not reflect the actual costs of students involved in distance learning. If not, they may need to be reevaluated.

Institutional eligibility: For the short term, the 50 percent rule is not perceived as a problem in the consortium model, since there is no positive or negative impact for consortium institutions.

Eligible program: This is not a federal problem because the institution determines eligibility of the academic program up-front.

Payment periods/term types: The consortium agreement should specify conversion of academic terms that are different than the home institution standard.

Deferments/student status confirmation reports/NSLDS: Central reporting activities occur at the home institution.

Competency-based courses: These are not unique to distance learning and should be prescribed in the consortium agreement prior to approval.

WHERE WOULD WE LIKE TO GO?

This model is actually a split model. That is, the student-centered aspect of this model is in student services, not in academic services. Institutions will have to be competitive in student services in terms of convenience and timing. Students will be able to select institutions based on the level of service and their satisfaction with the service.

There is a need to develop a mechanism to ensure consistency in record keeping among consortium members in terms of course registration, grading, transcript notations, etc. But we do not support any changes to the basic consortium model. It is supported as it is and should be self-regulated by the institutions.

WHAT DO WE NEED TO CHANGE?

One issue deserving further examination is whether or not we need to create a new distance learning budget. Rather than leave this issue up to the aid administrator in his/her exercising of professional judgment, a different approach would be to develop a budget protocol that would apply to all students in distance learning.

Institutions need to create equivalency tools to evaluate competency-based courses or outcomes-based models, including Advanced Placement.

Finally, the 50 percent rule will eventually need to be modified as distance learning opportunities increase and proliferate. We recommend that gatekeeping be strengthened so that there is no need for the 50 percent rule.
GROUP 3
SCENARIO: COMBINATION MODEL

This scenario reflects the issues that are faced by community colleges offering courses in traditional semesters. These schools currently offer traditional degrees and certificates using the standard calendar. In this model, the community college system is creating new programs offered in a variety of delivery modes, which includes courses delivered completely at a distance.

WHERE ARE WE NOW?

Several problems in current law, regulation, and practice were revealed for this model:

Consortium agreements: Students enrolling in multiple institutions are a problem. Consortium agreements are written between institutions and articulation exists from one level of college to another. Institutions have a variety of these agreements. This causes some NSLDS under-reporting problems. Some are clock hour schools and some credit hours schools, so transfers may not be smooth.

Access to services: Distance learning schools need to provide alternative access to bookstores, catalogs, and other student services.

50 percent rule: Rule creates anxiety for institutions trying to distinguish between correspondence and telecommunications. It also creates administrative burdens in tracking students. This rule also prevents colleges from providing all offerings at a distance.

Program eligibility: Schools cannot compete because of the long time needed to complete state and federal approvals and accreditation. This is problematic since quickly developing distance education and non-traditional courses are now expected by students and the community.

Program length: Schools need more flexibility to determine the maximum program length in order to respond to community needs.

Costs of education: Several problems are apparent here. Correspondence students cannot receive full aid. Nor can the cost of computers be included in the student budget. We are also concerned that handicapped and disadvantaged students are being shortchanged because they cannot participate in distance learning without the appropriate technology.

Diverse program offerings: Current rules discourage payments for: accelerated programs, programs in modules, open-entry/exit, and other forms of flexible programming; and students who “stop out” of their program and then return.

WHERE WOULD WE LIKE TO GO?

What is the ideal scenario for access and quality? The “one size” institutional model does not fit all students. Regulations and processes should be student-centered, not institution-centered. We discussed whether we should use different rules based on the type or control of institution and decided that would not be appropriate. We also had discussions about whether virtual institutions should have a whole new set of rules. We decided that the line between distance and non-distance is blurred and that education should be viewed as a whole, regardless of mode of delivery.

WHAT DO WE NEED TO CHANGE?

The group agreed that there are a variety of processes and procedures which need to change. Though we did not achieve consensus on many issues, several themes emerged:

✦ Eliminate the distinction between the distance learner and any other type of learner;

✦ Eliminate the 50 percent rule. We focused on how to assure that only quality institutions can provide Title IV aid. We would utilize provisional-status requirements in statute so institutions have more regulatory oversight when they are first establishing eligibility to provide Title IV aid;

✦ Strengthen the review process prior to granting institutional eligibility. A possible solution would be to tie the percent of aid recipients in the institution to the level of regulatory oversight. Higher volume of aid dollars or a higher percent of aid recipients would trigger more monitoring. Institutions would have to prove that they were providing quality programs and were good managers of Title IV funds in order to have regulations reduced. Another idea was to provide incentives to institutions who demonstrate quality;

✦ Expand the experimental site program. Use USDE authority to provide exceptions to the current rules. Expand USDE authority to include statutory waiver;

✦ Allow for electronic signatures or some form of pin number;

✦ Allow electronic entrance and exit interviews;

✦ Broaden discussion with other stakeholders. We think it is important to get input from lenders, guarantee agencies, state aid commissions, licensing bodies, accrediting agencies, and software vendors to smooth transitions to new models.

✦ Provide relief when adding additional locations for certification purposes.
Also provide relief from the requirements for new program approval. For instance, permit the colleges to simply notify USDE of these changes, without waiting for approval;

- Change the definition of academic year. Statute should be less proscriptive of academic year definitions by removing calendar time as a measure of completion. In this way a person could complete early without being penalized. We would measure completion using course requirements;

- Develop a national standard for determining price of attendance in distance education. This would standardize the amount which could be included in the student budget for distance education;

- Provide relief from cash management rules. Reduce the variety of time periods used in disbursements. And, add more flexibility in the release of funds;

- Eliminate the rule requiring 50 percent of correspondence lessons to be completed before disbursement;

- Eliminate refunds and repayments. Alternatively, do not penalize students for the dollar amount received when their total need had not been met so it more closely follows repayment rules;

- Give financial aid professionals discretion to determine the amount of loan eligibility by type of program instead of on a case-by-case basis;

- Financial aid and institutional processes should be student-centered. Place students in charge of their own educational goals, including a degree objective, certificate, or lifelong learning. The school should work with the student to determine the best processes for achieving that goal;

- Set aggregate eligibility measures for student aid. Use lifetime eligibility, credentials earned, credit hours, or competencies as evidence of progress rather than annual financial aid limits;

- Replace the ability to benefit process. Schools should inform students how to gain the skills and abilities needed to achieve in a program of study and direct them to the appropriate provider. This should include readiness to participate through technology;

- Create a new model for consortia. Create a new entity, called an Educational Maintenance Organization (EMO), to collect credits attempted and provide other services for students enrolled at multiple institutions. Alternatively, allow institutions to pay a unit of financial aid for each credit hour attempted. For instance, a student enrolls in three credit hours at one institution and three hours at another and receives payment from each of the institutions.

### GROUP 4

#### SCENARIO: NON-TRADITIONAL INSTITUTION

A non-traditional institution can be defined as an institution that doesn’t fit into the other three categories. These institutions use technology to deliver courses, and the students are at a distance from the institution and the instructor. They may be for-profit or non-profit, and may have a variety of governance structures.

Where Are We Now?

The current system contains several constraints that are or could be impediments to distance learning. These include:

- Definition of eligible institution;
- Definition of enrollment period;
- Definition of time or units of measurement;
- Institutional/faculty attitudes and interests;
- Multiple concurrent enrollments;
- Consumer information, including electronic entrance/exit counseling;
- Articulation/transferability of like courses between institutions;
- Current accreditation structure/focus;
- Lack of inter-agency communication at the federal level (ex: Labor, Commerce, ED, etc.);
- Absence of electronic signatures;
- How to measure attendance in the absence of “seat time”;
- Institutional accountability vs. student performance;
- Lack of outcome and assessment tools (need to define what we mean by “competencies”);
- Price of attendance definitions;
- Lack of understanding by policymakers (especially Congress) of distance learning concepts;
- Current fiscal accounting practices and funding, which operate on fiscal/calendar years.

Where Do We Want to Go?

The above “laundry list” of impediments suggests that several guiding principles are needed for a new model of student aid. Student aid should be:
Simple;
Predictable;
Easily communicated to the customers;
Replicable; and
Predicated on the GI bill model: “everyone had it, not everyone used it.”

We would propose a new educational funding model that is a more dramatic departure from current practice than what others may offer. We believe that distance learning will be a catalyst for change that will shift the concept of “eligibility” away from institutions and more toward students. This system would be student-centered, and assessment would be student competency-based. We would still require that a degree/credential be offered, but not in the context of how long it takes to complete that credential.

Providers would compete in an open market system and would be motivated to create efficiencies. Funding would be based on a voucher-type system with debit/smart card delivery, and would include lifetime rather than annual maximum aid amounts. An approach such as the National Commission on Responsibilities for Financing Postsecondary Education’s STEP model would be a good starting point for this kind of a new system.

**WHAT DO WE NEED TO CHANGE?**

To get to this new model, several specific changes need to be made. The focus for funding needs to change from time-based increments to outcomes/competencies. It should be possible to fund ineligible programs brokered through eligible institutions—for example, it should be possible for a program/course provided by Hewlett-Packard to be approved for credit by an institution like Western Governors University. Standards for assessing student competencies need to be developed by accrediting agencies.

Law and regulations will need to accommodate new definitions for “education providers” and “education credentialers”—distinguishing between the entity providing the education and the entity providing the credential. Direct costs and indirect costs will need to be separated in the aid awarding process. Payment/discharge will need to be based on incremental mastery of competencies, or progression toward an educational goal.

Additionally, loan repayment rules need to be re-engineered to accommodate distance learning models. Issues such as when a student enters repayment require careful consideration. Flexibility must be available to provide student-centered services such as loan counseling online. And ways need to be developed to electronically authenticate the student (e.g. electronic signatures/certificate authority).

**PRINCIPLES FOR FUTURE POLICY DEVELOPMENT AND DIALOGUE**

The final day of the Roundtable culminated in a lively discussion by participants about the future directions and opportunities for student aid in the distance learning context. While no “consensus” was derived from the discussion, six key principles for future policy development were identified. The focus of the discussion was on federal student aid, although some of the participants noted that these principles apply equally as well to state and institutionally-awarded assistance.

The principles were suggested as the foundation for an ongoing dialogue about the nexus between distance learning and student assistance, irrespective of the scenarios envisioned by the different working groups. They are a starting point for further discussion and policy development. These principles include:

**Student aid should be available without regard to mode of instructional delivery.**

The scenarios discussed for most of the Roundtable point out the tremendous diversity that is possible in instructional delivery in a technology-mediated context. However, despite this eclectic universe of current and future modes of instruction, one of the most strongly voiced perspectives emerging from the Roundtable was that no mode or type of institution deserves special treatment. Participants pointed out that while distance learning has the potential to significantly alter the landscape of higher education, it should not end up with special or different status as it relates to student financial assistance. Rather, distance learning’s transformative capacity should be seen as an opportunity to improve how postsecondary education is financed, just as it is seen as having the capacity to improve how and where students learn.

Limitations in current law and regulation are intended to ensure quality and reduce fraud and abuse, but many participants noted that these very limitations can also discourage change and innovation. For example, the current prohibition against the awarding of federal aid to a student attending any institution which offers more than 50 percent of its program of study by “correspondence” is intended to protect the integrity of federal programs. Participants agreed that providing quality education should be the primary goal, but new methods for ensuring quality while encouraging innovation will need to be developed.

**Delivery of student aid should be learner-centered, with aid following the student through the academic program.**

The concept of “learner-centered” aid delivery was endorsed by many participants. In a learner-centered environment, financial aid is delivered in ways...
which acknowledge the variety of student needs rather than through processes standardized on an arbitrary mean. Several participants suggested that the educational institution as the primary "unit" in the student aid delivery system must be replaced. Participants envisioned a system where technology would be able to seamlessly track student enrollment, allowing him or her to pursue learning from several different providers in several different locations. This would allow student needs and goals to be the primary focus in the delivery of student aid. Several participants noted that this goal could take quite some time to be achieved.

Aid should be awarded only to those in accredited programs of study that confer a recognized credential, such as a degree or certificate.

Though several participants acknowledged that the concept of an educational "credential" is being challenged by "skills mastery" and "competency," most said that a degree or certificate is still the most accepted public indicator of academic achievement. As a result, aid should continue to be awarded only to those students enrolled in a program leading to such a credential.

It was acknowledged that some proportion of the education could be furnished by an unaccredited provider, as long as the accredited institution offers assurances that it accepts the techniques and outcomes of those providers as sufficient to meet established standards at that institution. Increased reliance on the process of accreditation to assure quality was supported by conference participants as an essential part of the postsecondary educational process.

The awarding of student aid should be tied primarily to standards of academic progress and not arbitrary measures of time.

"Seat time" and other time-based measures of academic progress were seen by participants as increasingly irrelevant to the postsecondary education institutions of the future. Participants noted that aid should focus instead on the accomplishment or achievement of specific academic goals, such as successful completion of a course or mastery of specific skills. This would allow for flexibility in where students can obtain postsecondary education, a key tenet of the learner-centered approach to student aid.

Regulations should allow flexibility on the part of institutions in determining how to calculate eligibility for aid to pay for direct ("tuition") and indirect ("living expenses") costs of attendance.

One of the most difficult definitional challenges presented by technology-mediated learning is the lack of clearly identifiable "living costs." As in a traditional learning context, concepts such as "room" and "board" or even "books" and "supplies" remain important, but are often difficult to measure. Living costs for distance learning students may also involve hardware, software, access fees, telephone charges, and a host of other expenses.

Flexibility based on the judgment of aid administrators, within the context of acceptable indirect cost categories defined in regulation, would greatly enhance student access in the constantly changing environment of distance learning. The absence of such flexibility will require virtually non-stop revision of regulations and guidelines to take into account new technologies and pedagogical approaches.

Aid amounts and limits should be focused more on lifetime standards than annual or institutional maximums.

Distance learning and lifelong learning are inextricably linked. Distance learning is one of the primary catalysts allowing for the expansion of post-secondary education well beyond the parameters of the traditional 18 to 24 year-old age range.

As the increasingly global economy and rapidly changing job market require constant upgrading of skills and knowledge, technology is helping to improve the opportunities for lifelong learning. One way to ensure that this continues is to refashion aid amounts and limits to more closely reflect these changing circumstances. Lifetime aid maximums, or limits based on the achievement of specific credentials, would be much more desirable than the current system of strict annual limits.
APPENDIX

DISTANCE LEARNING: FOUR SCENARIOS

The four scenarios reproduced in the following pages are the documents used by the working groups to frame their discussions. All participants were provided with these scenarios in advance of the conference.
SCENARIO:
TRADITIONAL UNIVERSITY

Institutional Structure:

Traditional University, a four-year private institution accredited by the North Central Association and approved by its state for teacher’s licensure, has been in existence for over 100 years. At multiple campuses throughout the state, Traditional U. provides four-year baccalaureate degrees, undergraduate degree completion and certificate programs, as well as, several master level degrees. A Board of Trustees advises senior staff in the operations of the university. Institutional operational costs are funded primarily from student tuition payments.

Like many institutions of higher education, Traditional U.’s student population has evolved from primarily 18-22 year old students that attend classes during fall and spring semesters into a mix of “traditional students” and a larger group of working adults who cannot attend classes during the week day. In order to meet the needs of this “new” type of student, multiple modes of educational delivery are utilized, including traditional classroom-based education, accelerated classroom-based education, guided independent study, credit for prior learning and distance learning. Students may choose a single or multiple modes of educational delivery within their program.

Student enrollment status is defined by the semester. Within each sixteen week semester, students may select course options that extend the entire semester, as well as, accelerated courses which last five or eight weeks. Undergraduate students enrolled for twelve credit hours during the semester are considered full-time and six credit hours are half-time. Adult students typically attend school year-round.

Consortium agreements have been established with several two-year institutions within the state in order to provide students with a smooth transition to a four-year degree. Likewise, articulation agreements have been established with the community college system in the state.

While residence halls are available on Traditional U.’s main campus, most students either commute to their campus or are engaged in a distance learning model.

Instructional:

Students are admitted to Traditional U. following standard admissions requirements. Upon entering the university, students are assigned a faculty advisor who initially assists with the completion of the student’s degree plan and then continues in an advisory capacity throughout the student’s degree pursuit.

All instructional delivery models utilize similar course content and expected outcomes. The primary differences are the amount of time required to complete the course and/or the existence of face to face discussion. Distance courses are taught by university faculty utilizing e-mail, phone, Web-based threaded discussion, books, and videos.

Academic Progress is continually monitored by the professors teaching the courses and faculty advisors. The same level of achievement is expected for degree completion for all delivery models. Distance courses require the need for thoughtful organization in order to provide clarity of thought. Non-verbal cues are not available to students in this model. Monitoring the “virtual student” for quality control requires review for consistency of work and language usage at the appropriate level.

Financial Aid Satisfactory Academic Progress review is the same for all students on financial aid regardless of the instructional delivery model. The review includes a semester by semester assessment of credit hours completed by the student vs credit hours attempted and an annual review of GPA.

Frequency of course offerings is based on student demand. Distance courses may be offered to smaller groups of students more economically than classroom-based because of lower overhead costs.

Costs of Education:

Since Traditional U. is a private institution, all students pay the same tuition regardless of their state of residency. However, tuition fees vary by type of program, ranging from $465 per credit hour for “traditional” classroom based courses to $219 per credit hour for distance courses.

Financial Aid budgets are designed to include tuition charges based on the intended enrollment specified by the student on the FAFSA. Books and supplies are also built on intended enrollment. Average living expenses, including personal expenses, are based on the number of semesters the student indicates they will be attending and their housing plans (i.e., at home vs. on or off campus). A financial aid budget for nine months for a full-time undergraduate student living off-campus can range from $24,160 to $14,368 depending on their program.

Students are only allowed to charge tuition, fees, and room and board on their student accounts. Student payments are made via cash, credit card, tuition deferment, company reimbursement or financial aid. The university provides its own tuition deferment plan. No fee is required to defer charges that are covered by financial aid. A fee is required in order to defer payment of charges not covered by financial aid. Financial aid is credited to a student account after the add/drop period which establishes their enrollment eligibility for aid. Any credit balance is refunded to the student within fourteen days unless the student specifically requests that it be retained on their account.

Student Services:

Course registration is handled either in person or by phone or fax through contact with a staff member.
“online” registration is as yet not available. The Office of the Registrar is located on the main campus, however, campus associates at the individual campuses assist students with registration. The university bulletin is available on the web.

Student billing and payment is handled through one central office located on the main campus. Likewise, financial aid for all university students is processed through one central office on the main campus. Communication links have been established with the other campuses in order to expedite student service.

Some of the services that are provided for the 18 to 22 year old population at the main campus are not applicable for the adult student. Different services have evolved in order to meet the distinctive needs of adult learners. An example is workshops designed to enhance learning skills for students returning to school after an extended absence.

Books and study materials are available through the book store or directly from the distance learning program.

Career counseling is handled through the main campus Career Counseling Center.

Other:

Program offerings have been designed to fit within standard guidelines in order to conform with financial aid regulations. Does this best serve the adult student’s needs when acquiring an education?

The issues of security and password protection in order to allow student electronic access to the admissions application process, registration process, and information on student billing and financial aid accounts are major challenges facing the institution as it strives to provide better services to its students.

SCENARIO:

CONSORTIUM

Disclaimer

The purpose of this paper is to explore policy and operational issues involved in the provision of student financial support to individuals who enroll in the California Virtual University (CVU). Neither the broader community at the University of California, nor any of the other approximately 320 institutions in the California Virtual University, have had an opportunity to review this document or discuss its content. No endorsement should be construed to the model being described here; no consensus has been developed and no other parties have been involved in the formulation of the ideas expressed here. This is a work in progress for discussion purposes only.

Overview

The California Virtual University is a cooperative, campus-based effort to provide distance learning opportunities among over 300 already-existing accredited postsecondary institutions in California. One of the key distinctions of the CVU as compared to the Western Governors Association (WGA) construct is the campus-based core, a feature key to consideration of the delivery of student financial assistance to enrolled students. A full description of the history, the rationale and other important facts regarding the California Virtual University is available to readers of its ACADEMIC PLAN, which was finalized recently. Copies of this material are available: http://www.virtualu.ca.gov/Faculty/academic.html

Legal Impediments - Federal

The rental or purchase of equipment such as a computer, an Internet provider service (IPS), or access to online information (articles, books, etc.) is not allowed as part of a student budget under HEA Title IV, the federal funding program that is the source for a large fraction of the student financial assistance available to students enrolled in postsecondary institutions. For purposes of this paper, the assumption of statutory relief on this impediment is being made as part of the 1998 reauthorization of the underlying statute.

In addition, under current law, an institution is not eligible for participation in federal student aid programs if more than 50 percent of its courses are taught through a combination of correspondence and telecommunications, or if more than 50 percent of its students are enrolled in correspondence or telecommunications courses. While this limitation is, at this time, an appropriate protection against unscrupulous vendors and is not likely to affect institutions now participating in the CVU, supporters of CVU are collectively working to ensure that participating institutions wishing to try out expanded distance learning proposals have access, where appropriate, to statutory exemptions in the form of experimental site or pilot program
authority at the Secretarial level at the Department of Education. Moreover, there is increasing recognition that the distinction between distance learning and "correspondence courses" is a fading, if not false, distinction, as distance learning often relies on the exchange of correspondence, albeit online rather than on paper. CVU supporters generally support the elimination of the statutory and regulatory distinctions being drawn between these two terms.

Legal Impediments - State

At present, there are a variety of California legal codes and regulations that will need to be altered lest they discourage development of distance learning. For purposes of this paper, however, the most obvious need for greater flexibility lies in the strictures on the uses of CAL GRANTS, state need-based grants available to meritorious undergraduate California residents enrolled in accredited California institutions, including CVU campuses. There is interest in seeking funding from the state to provide additional funds to the CAL GRANT program to provide incentives to augment awards to help mitigate the additional costs of computers, IPS charges, and access to online information borne by distance learners.

Illustrative Example Of CVU Student

For purposes of this exploration, it is useful to understand that a typical CVU enrollee is a student who is already enrolled and matriculated in a member (CVU) California institution; every CVU student has a host campus where, in order to be considered for eligibility for federal and state financial support, the student must be enrolled in a program leading to a degree, certificate, or recognized credential. Thus, not all CVU students may be candidates for the full array of student financial support; students enrolled for a program of study that does not necessarily lead to a degree, certificate, or a recognized credential, may be limited to consideration for institutional support only, which is entirely in the purview of the host campus. For purposes of this paper, we will focus on students who are eligible for consideration for Title IV financial aid, whether need-based or not, and therefore possibly for state aid, where administrative financial aid coordination between the home campus and the CVU host campus is an issue.

For purposes of this financial aid model, a CVU host campus is then a CVU member campus where a distance learner enrolls for one or more courses approved of and acceptable to the home campus for credit toward the student's degree, certificate, or credential. In the financial aid world, the relevant model for this discussion is the Title IV consortium or contractual agreement. (CFR - 34, Section 600.9, Written agreement between an eligible institution and another institution of organization.)

The CVU Academic Plan appears to anticipate linkages between and among CVU campuses only, and does not address the character of relationships between CVU campuses and institutions that are not CVU members. While the discussion in this paper might prove useful as a blueprint for such links, the focus of this paper is to develop a model and raise policy issues for providing student financial support for individuals enrolled in a CVU home campus taking one or more courses at one or more other CVU host campuses.

Model Contracts Between Home And Host CVU Campuses

Based on the current academic plan and the requirements for major student financial assistance programs, it would appear that contracts among CVU campuses should specify agreements regarding the following exchanges that will take place between home and host campuses:

- the type and manner of general communication between the parties and the designation of official contact personnel authorized to commit the campuses to the agreement;
- the type and manner of exchange of waivers of privacy from students (and required notice to students) enrolling in CVU courses necessitating the exchange of personally identifiable information between the home and host campus;
- explicit agreements as to the home campus treatment of grades and credit conferred by the host campus;
- the timing and manner of notice of acceptance of the student by the CVU host campus in response to a student application together with the notice of pre-approval by the home campus;
- the schedule of direct charges and estimated indirect student costs that the host campus anticipates the student will spend for the CVU course over and above amounts paid to the home campus;
- the timing and manner of notice by the host campus to the home campus as to the portions of all direct charges levied on each student that qualify under the Taxpayer Relief Act as "qualified tuition and related expenses;"
- the frequency and manner of attendance reporting, including initial attendance, that the home campus will require of the host campus;
- the timing and the manner of remittance from the home campus to the host campus with respect to fees (direct charges) paid for CVU course work;
- the timing and manner of notice of student withdrawal from the host campus;
- the timing and manner of refund from the home campus to the host campus in the event a student withdrawal results in a refund of CVU direct charges;
- the shared schedule of refund deadlines and refund policies and practices to be observed by both the home and host campuses;
- the timing and manner of the exchange and ongoing maintenance of certi-
pose both policy and operational difficulties, in the event that the patterns of student enrollment and need for financial aid in CVU do not result in a fairly even distribution of reciprocal awarding of student financial aid across active CVU members.

This model does not address the potentially serious disconnection between the cost to the home campus of aid sufficient to cover higher CVU costs and the payment of CVU fees to the host campus, if the usual practice of the home campus is to devote some portion of student tuition and/or fees, which will for CVU courses be paid to the host campus, to funding student financial aid awards. Under the current model, the home campus will be expected to provide financial aid funds sufficient to cover the extra CVU charges set at what the “market will bear” that are charged to the student, while the host campus simultaneously reaps the financial rewards associated with charging market level fees for CVU courses.

CVU campuses would be well advised to set up some sort of evaluation or monitoring procedures for determining the costs their institution of requiring the home campus to pay the costs associated with CVU enrollment and consider, at its discretion, other budget add-ons for additional distance learning costs not associated with direct host campus charges, that the student presents;

While there is no reason why the contracts between CVU members need to be rigidly standardized, such a trend has the potential to reduce administrative burden for both parties. Moreover, some standardization of the links between home and host campuses will tend to make the routines and expectations of students more predictable and better understood. The proliferation of different contracts containing disparate rules, while occasionally appropriate and even necessary, will make the administration of the CVU more complicated and therefore expensive, more prone to error and exception, and more confusing for students.

**Student Budgets For Distance Learners**

Bedrock to the provision of student financial assistance is the creation of a student budget that includes the various recognizable legitimate educational expenses that a student will incur. For a student enrolled in one or more CVU distance learning courses, the student will have the basic budget associated with the particular program and living environment offered to other similar students at the home campus, in addition to which the home campus will also recognize the additional expenses associated with enrollment in the approved CVU distance education courses. As CVU is currently structured, students will receive their entire student aid packages from the home campus, including any aid intended to cover the “budget add-ons” associated with enrollment in the CVU distance learning courses approved by the home campus, amounts which are above and beyond the standard home campus budget for students in analogous residential programs that do not include enrollment in CVU courses.

**Funding For Financial Aid For CVU Students**

Home campuses will package and award aid for students enrolled in CVU courses using the same policies and procedures that they use with other students, despite the larger budgets. As currently conceived, the CVU academic plan anticipates that home campuses will use their own funding to provide sufficient financial aid to cover the extra costs associated with CVU, this despite the fact that the extra charges associated with compensating the host CVU campus for the costs associated with distance learning will be transferred from the home campus where they are paid to the host campus once they are collected by the home campus. This feature of the CVU could
on campus with similar budgets and personal financial circumstances not associated with the CVU enrollment;
- fund the financial aid as though the student were enrolled in entirely on-campus course work, including the provision of institutional aid using the same policies applicable to other students with similar budgets and personal financial circumstances;
- deliver the financial aid using the same procedures used for residential enrolled student where practicable (apply funds to student account and remit any remainders to student via checks, direct deposit, etc.)
- remit to the host campus required CVU charges levied on the student and paid by the student or funded by the student’s financial aid;
- monitor, in cooperation with the host campus, and report to relevant agencies on the total workload enrollment of the distance learner;
- report to the student, the relevant taxpayer, if any, and the IRS payments and financial aid, including those associated with CVU, as required by the Taxpayer Relief Act;
- record as part of the home campus transcript credit earned in CVU courses applicable to a home campus degree, certificate, or credential, based on official notification from the host CVU campus;
- refund to student and other funding sources appropriate amounts in the event of an official withdrawal from the CVU course prior to the deadline for refunds; and
- monitor and arbitrate satisfactory academic progress associated with students enrolled in distance learning based on the same policies and practices used with other enrolled students on the home campus.

The CVU host campus will:

- enroll in CVU courses only students who have the prior official approval of their home campus;
- send official notification to the CVU home campus of the acceptance of the student into the CVU course together with the information regarding the course calendar, anticipated credit for workload calculation purposes, host campus direct charges for the course, and estimated additional student costs associated with enrollment in the course (computer use, Internet access, charges for access to information, etc.);
- send notice of initial attendance to CVU home campus, and any period updates on attendance required by the home campus, if any;
- provide the promised educational experience (course work) as described in the CVU catalog;
- send acknowledgment to CVU home campus of transmittal of payment of host campus direct charges for CVU course;
- send official notice of withdrawal or course completion and credit conferred to CVU home campus; and
- refund to the home CVU campus appropriate amounts in the event of an official withdrawal prior to the deadline for refunds.

Conclusion

The California Virtual University has not been in existence long and has not yet grappled with many of the issues that will arise as a result of the design described in the Academic Plan. While many students who enroll in the CVU will not be eligible for student financial assistance because they are not enrolled in a degree, certificate, or credential program or because they are not enrolled in sufficient units or clock hours to meet the minimum threshold for eligibility for aid, increasing popularity of distance learning will require CVU institutions to prepare for the mutual administration of financial aid for some CVU students. This paper is intended to be a rough sketch of what might be facing CVU institutions as they prepare for this eventuality.

As institutions gain experience administering student support for distance learners in a model such as the CVU, the policy and operational issues that emerge will need to be revisited. This draft, then, may be among the first of several emerging analysis of providing financial aid in a large and complex.
SCENARIO:

COMBINATION

Institutional

The State Distance Education Community College (SDECC) was created by the state legislature in 1996. It is one of the 15 community colleges in the state-supported community college system. Each of the system colleges is a stand-alone college separately accredited by North Central and funded by the state legislature. The purpose of SDECC is to provide leadership in the state in creating alternatives to traditional on-campus program offerings by utilizing technology for instructional delivery. Its mission is to offer associate's degrees and certificate programs completely electronically.

The state-level community college system board of directors governs SDECC. SDECC has a college president and an advisory board. Credit is earned using credit hours. Funding for the colleges is from State FTE reimbursement and student tuition payments.

SDECC Today

Currently SDECC is in pre-accreditation status. Because of the limitations imposed by the Title IV regulations SDECC does not offer any programs. It is currently a division of the State System which helps broker programs through the other existing institutions.

SDECC in the Future

SDECC has no resident students. All offerings are through distance methods. Since the mission of this college is to offer programs to distance learners, it seeks to create degree and certificate opportunities for students in a variety of ways.

Planned Offerings

- SDECC Degrees-Associate of Arts degree and certificate programs taught by resident faculty to students completely at a distance using many different methods including Internet and videotape technology. Faculty uses the state of the art facility at SDECC to convert their current offerings to distance offerings. Faculty/student contact is through mail, phone, chat-room, threaded discussion, and other distance methods.

- Consortial Degrees-Consortial degrees may work in several different ways. In one model, SDECC selects current distance offerings from within the 15-college system to construct new degrees and certificates. Faculty from each of the system colleges offers one of the courses. SDECC awards the degree.

In another model each of the 15 colleges offers the same degree program. A student accesses the Internet enrollment page, selects a course, and applies for college admission at the same time. One faculty in the college system teaches each of the courses. Each faculty may have students from many other system colleges in his or her course. The degrees are awarded by each of the colleges.

- Calendar-Some programs are open-entry open-exit in which the student starts any day and finishes when the credit hours are completed. The student may then enroll in the subsequent term and work as quickly as possible towards their degree or certificate. Some programs follow the traditional semester calendar or are offered in eight overlapping 15-week terms each year. In response to community needs some short certificate programs of 15 credit hours in length are offered.

- Controlling Quality-The accreditor approves the college and its offerings with special focus on distance offerings. All instructional degree and certificate offerings by all the community colleges including SDECC must be approved first by the community college board and then by the state commission of education.

Degree programs have instructional content guides that explicitly state learner outcomes in behavioral terms for every unit of every course. In consortial degree offerings each degree has an academic standards committee made up of representatives from the system colleges and faculty who teach the courses. They have a curriculum approval process.

Costs of Education

Tuition and Fees-Costs are standard in the community colleges across the state. Students pay different rates if they are out of state students. The board of directors may approve differential tuition rates on a program by program basis. Current rates are $55 per credit hour plus fees. A student enrolled for two terms for 15 credit hours each would pay $1,650 tuition and $325 in fees totaling $1,975. The out of state rate is four times higher. Students pay for each credit hour attempted. For some distance programs offered by SDECC the tuition cost for both in and out of state students is the same higher than in-state rates and lower than out of state rates. The institution will provide a computer at low cost to students in distance courses upon student request.

Student Services

Admission and Registration-Courses are collected into a virtual catalog available online. Students may complete admission applications, in-state residency designations, and register using the web page. Electronic signatures are acceptable for this process.
**SCENARIO: NON-TRADITIONAL**

Non-Traditional institutions can be defined as those that don’t fit into any of the other three categories that we’ve identified: Consortia, Traditional and Mixed. Many non-traditional institutions use technology to deliver courses, and often the students are at a distance from the institution and the instructor. Non-traditional institutions may be for-profit or non-for-profit and may have a variety of governance and management structures. Examples of Colorado-based non-traditional institutions include International University (a subsidiary of Jones, Inc.) and Western Governors University.

**A) Institutional Structure**

- Governance/accreditation/licensing - Non-traditional institutions may be accredited by regional accrediting bodies, accredited by a distance education accrediting body, or a professional association. New non-traditional institutions might be seeking accreditation. And some non-traditional institutions may not have accreditation and not seek accreditation.

- Programs of study description - The definition of a program of study may become more challenging for a non-traditional institution. A trend that offers particular challenges to traditional definitions is competency-based programs. In a competency-based program, a student might be fully engaged in their program without being matriculated in courses in the traditional way. In addition, concurrent enrollment through multiple institutions is possible.

- Degrees granted/conferred - For competency-based programs, degrees are conferred by a program council. This is the same faculty body that is responsible for the definition of the competencies that comprise the degree. In addition to degrees, non-traditional institutions are likely to grant certificates of mastery.

**B) Costs of Education**

- Tuition charges (resident/nonresident) - Non-traditional institutions are more likely than traditional, state institutions to charge a single tuition rate. However, these institutions are also more likely to charge incremental fees for the value-added student services that they offer to distance students.

- Tuition payments (how are payments received/distributed) - Non-traditional, distance education programs are likely to use the technology of the Internet to handle many money-handling processes. Secured servers are required to accept credit-card payment over the Internet. These systems are in place to help automate and manage the distribution of financial aid funds as well. One issue these automated processes raise is the acceptance of e-signatures.

- Student Financial Aid Budget - Calculations of student costs for students who are not physically on campus in dorms are challenging. It is important to

- Academic Counseling - Academic counseling and pre-testing including “ability to benefit testing” are available through the academic counseling/testing center and may be completed using web based tests on the Internet.

- Financial Aid - All SDECC programs are eligible for financial aid. Students may access all financial aid counseling and services using the web including application and awarding, loan entrance and exit counseling. Phone and mail access is also available.

- Bookstore - Bookstore services are offered via web. Students pay for books and supplies with a credit card or by sending a check. Books are shipped immediately.
ensure that distance students are not at a disadvantage in the calculation of their budgets. Students at a distance have different costs of attending the institution, but their costs are just as real.

C) Instruction

- Academic progress (FA and non FA)-Non-traditional programs are more likely to have non-traditional academic calendars and to offer students more choices of how to achieve their degrees or certifications. For example, WGU offers competency-based certifications and students might be advised to pursue self-study, internships, or take a class through their local community college to achieve certain competencies. Therefore, non-enrollment through WGU does not indicate a lack of academic progress. How to measure academic progress for programs that are not credit-based is also a challenge.

- Course offerings (pre-requisites/frequency)-Non-traditional institutions are more likely to offer courses that start throughout the year, rather than at the traditional semester or quarter start dates.

- Quality control (the virtual student)-There are many issues around ensuring quality control for the virtual student. Issues range from authentication in work assignments and testing, to ensuring that the student has adequate support from the institution. Distance delivered programs typically experience lower retention rates than on-campus programs. Students in cohort-based distance-delivered courses are much more likely to ask for an extension of the time to complete the course than their campus-based counterparts. There are questions about the comparability of the content retained by students at a distance, etc.

D) Student Services

- What are they and how are they delivered-The level and quality of student services delivered at a distance varies by program. The goal should be to deliver the same level of services to students at a distance as to those on campus. But the limitations of the technologies make some of the services more challenging to deliver. Basic student services which should be considered include: Bookstore, Library, Admissions, Registration, Bursar, Technical Support, Financial Aid, Career Counseling, Academic Advising, and Student Union (providing for synchronous & asynchronous interactions). The difficulties with synchronous technologies and the sensitive nature of some of the issues that need to be discussed to provide these services offer special challenges for distance-delivered student services.

- Describe interactions with faculty/staff and other students-Non-traditional programs that are distance-delivered may promote a variety of interactions. Many distance-delivered programs use mostly synchronous communication, simply convening groups of students at off-campus centers to interact with an instructor and fellow students at a campus-based site. In these cases, interaction is synchronous, using the delivery technology for video, phone lines for audio, and/or the Internet to share files and data. However, many students prefer an asynchronous model, which allows them the freedom to work with the course material and interact with the faculty and other students at their convenience, asynchronously. The advent of the Web has resulted in an explosion of Web-based, asynchronous courses. In this model interaction is typically achieved through email, threaded discussions, and synchronously, through chatrooms or Web-based conferencing technologies. Some Web-based courses are cohort-based, while others use an independent study model.

- Consumer Information-The issues of protecting consumers are very real, and should be addressed by the appropriate agencies. Institutions should be required to disclose fully to students the pros and cons of distance-delivered programs.
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## ROUNDTABLE AGENDA

### SATURDAY, MAY 2
- **Check In** 4:00-6:00 p.m.
- Confirm your small group assignment
- **Reception and Keynote** 5:30-8:30 p.m.
  - Education Technology and Training Center
  - Colorado Electronic Community College
- **Keynote Address** 7:30 p.m.
  - Kay Howe
  - Consultant

### SUNDAY, MAY 3
- **Welcome and Introductions** 8:00 a.m.
  - Jerry Sullivan, Conference Co-Chair
  - University of Colorado, Boulder
- **Review of Conference Goals** 8:15 a.m.
  - Jamie Merisotis, Facilitator
  - The Institute for Higher Education Policy
- **Department of Education Overview** 8:40 a.m.
  - Panel presentation on the current status and challenges of distance education
  - Marianne Phelps
  - Cheryl Leibovitz
  - Howard Fenton
  - Fran Susman
  - Jeffrey Baker
- **Small Group Discussions** 9:15-12:00 p.m.
- **Working Lunch** 12:00-1:30 p.m.
- **Panel Presentation: Providing Quality Student Services to Distance Education Learners**
  - Barbara Krauth
  - Western Interstate Commission on Higher Education
  - Marybeth Susman
  - Colorado Electronic Community College
- **Small Group Discussions Continue** 1:30-3:00 p.m.

### MONDAY, MAY 4
- **Small Group Presentations** 3:15-4:30 p.m.
  - Each group presents a short report on the outcome of their discussion
- **Prepare Draft Report** 4:30-5:30 p.m.
  - Facilitators and recorders from small groups prepare a draft written report
- **Dinner on your own**

Small group written reports are due in electronic format by 6:00 p.m. The combined reports will be available to all participants at the registration table by 10:00 p.m.